



Axis 360 Administrator User Manual

May 2015

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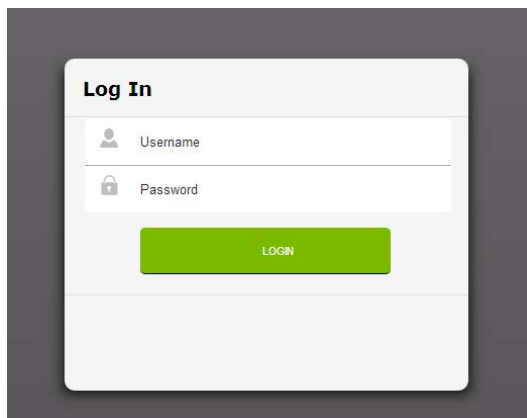
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1 Introduction

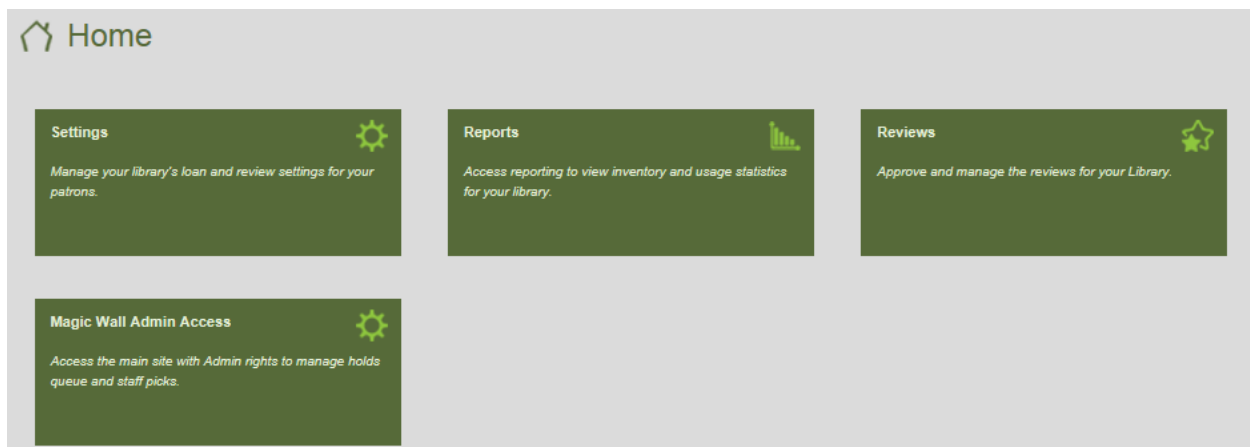
Welcome to Axis 360! As an administrator, you'll have access to the Library Administration portal, where you can edit and customize your Axis 360 site, run reports, manage user reviews and more. This user manual will teach you to navigate and master the system's administration tools.

1.1 Site Access and Home Page

To access the Library Administration portal, enter `http://[your Axis 360 site URL]/admin`. Below is the login page for the Library Administration portal. Enter your username and password and click the LOGIN button.



Once logged in, you'll be directed to the home page, where you can adjust your settings, run reports, and approve or delete reviews or access the Magic Wall with Admin rights.



2 Settings

Here you can access and adjust your library settings and manage users, notifications, and staff picks.

2.1 Library Settings

The options available under Library Settings allow an Administrator to manage and edit settings associated with the site. After any changes are made on this screen, click the Save button.



Tip

To view a description of each field, hover over the question mark  next to the desired field.

2.1.1 Library Site Settings

Use the settings to predetermine how the page will display for your users.

- Landing Page - default page that displays when a user accesses the site
 - Options include: Magic Wall or Staff Picks
 - Note: Selecting Staff Picks removes the Category, Sub-Category and View Layout options
- Category - displays on the left side of the Magic Wall
- Sub-Category - displays at the top of the Magic Wall and allows the user to filter titles by making additional selections
- View Layout - sets the default View Layout for the site

Note: New titles are discoverable by browsing or searching as soon as they are available in the collection; however, new titles will not display in their respective category on the Magic Wall until the next day.

2.1.2 Lending Settings

Lending settings are set by the eRead Illinois team. If you have questions or comments about the current lending settings, please contact ereadillinois@railslibraries.info.

Lending Settings

Checkout Limit ⓘ 20	Hold Limit ⓘ Limited 10	Hold Period ⓘ 2
Minimum Lending Period ⓘ 1	Maximum Lending Period ⓘ 2	Default Lending Period ⓘ 1

- Check out Limit - maximum titles a user may check out at one time
- Hold Limit - maximum titles a user can have on hold at one time (setting the limit to 0 allows unlimited holds)
- Hold Period - length of time a user has to check out a title after the title is reserved
- Minimum Lending Period - minimum number of days a user can have a title checked out
- Maximum Lending Period - maximum number of days a user can have a title checked out
- Default Lending Period - default number of days a title is checked out when the end user selects Check out Now

2.1.3 Enable Patron Reviews

Select Enable Patron Reviews if you wish to display user reviews of library titles. If reviews are enabled, you are responsible for reviewing and either approving or deleting them. If a review contains any blacklisted words – a list of terms that you establish as potential “red flags” when you set up your Axis 360 site – it will be categorized under the Blacklisted Reviews heading, away from other pending reviews.

When you set up your Blacklisted Words list, use a semicolon (;) to separate each term.



Enable Patron Reviews

☒ Patron Reviews Enabled ?

☐ View other Public Reviews ?

☒ Make My Reviews Public ?

☐ Make Reviews Public To Consortia ?

☐ View Public Reviews From Consortia ?

Tag Line: ?

eRead Illinois is supported by the Illinois Secretary of State through the Illinois State Library

Blacklisted Words: ?

dumb; stupid; suck

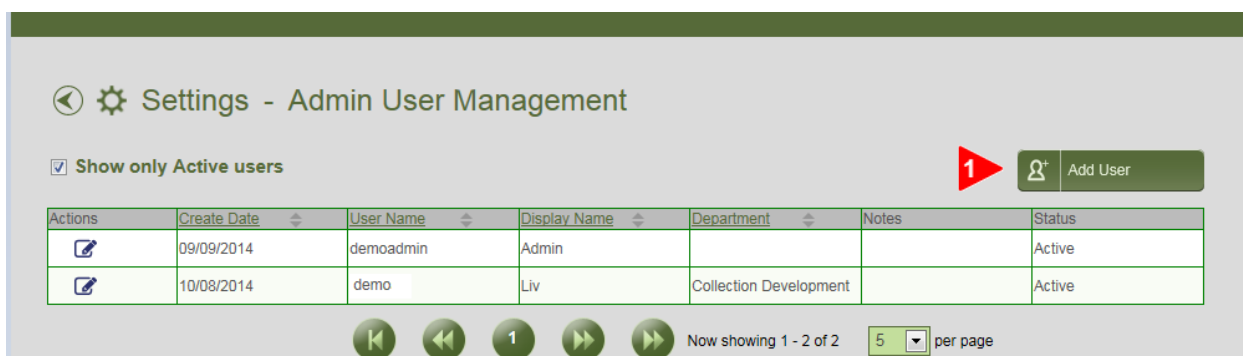
- Patron Reviews Enabled - allows end users to write reviews
- Make My Reviews Public - allows your end user reviews to be visible to other libraries using Axis 360
- Make Reviews Public to Consortia - allows your end user reviews to be visible only to other libraries in the eRead Illinois consortia
- View other Public Reviews - see reviews from other libraries that have made their reviews public
- View Public Reviews From Consortia - see reviews from other libraries within the eRead Illinois consortia

2.2 Admin User Management

Admin User Management enables the library to add, update or activate/inactivate users. An Admin User will also have the ability to decide which permissions the user will have access to.

2.2.1 Create a New User

1. You can create a new user by clicking on the **Add User** icon.



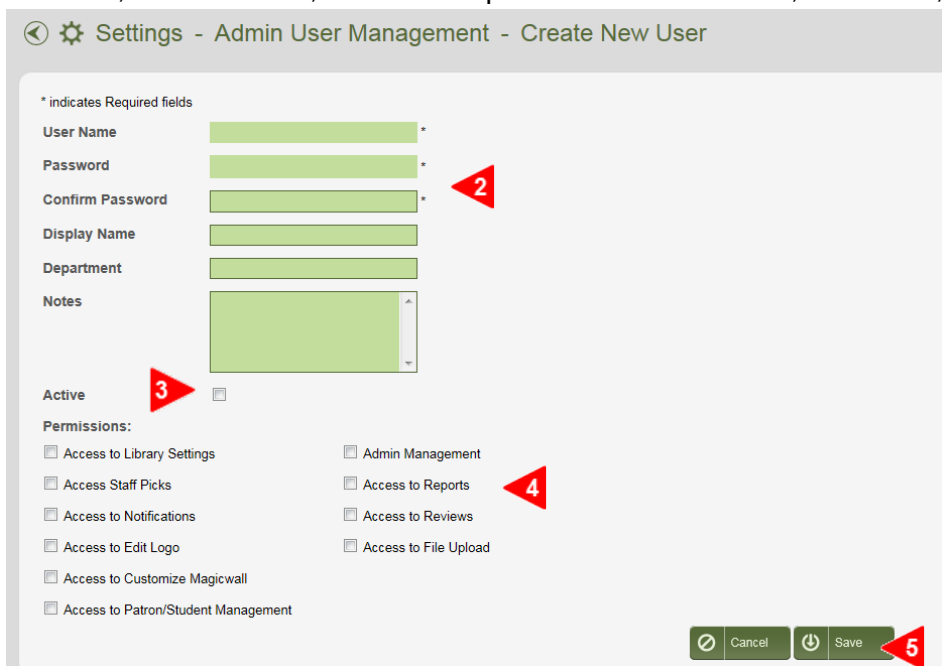
Settings - Admin User Management

☒ Show only Active users

Actions	Create Date	User Name	Display Name	Department	Notes	Status
	09/09/2014	demoadmin	Admin			Active
	10/08/2014	demo	Liv	Collection Development		Active

Now showing 1 - 2 of 2 5 per page

2. Enter, at a minimum, the three required fields User Name, Password, and Confirm password.



Settings - Admin User Management - Create New User

* indicates Required fields

User Name

Password

Confirm Password

Display Name

Department

Notes

Active ☐

Permissions:

☐ Access to Library Settings ☐ Admin Management

☐ Access Staff Picks ☐ Access to Reports

☐ Access to Notifications ☐ Access to Reviews

☐ Access to Edit Logo ☐ Access to File Upload

☐ Access to Customize Magicwall

☐ Access to Patron/Student Management

Cancel Save

3. Check the box to activate the user

4. Select the permissions the user will have access to.

5. Click on Save

2.2.2 Edit a User

Settings - Admin User Management

☒ Show only Active users Add User

Actions	Create Date	User Name	Display Name	Department	Notes	Status
	09/09/2014	demoadmin	Admin			Active
	10/08/2014	LRBitner	Liv	Collection Development		Active

Now showing 1 - 2 of 2 5 per page

1. To edit a user, click on the Edit Icon.

Settings - My Account

Account Information

User Name: demoadmin
Display Name: Admin
Department:
Notes:
Active: ☒ 2

Permissions:

- ☒ Access to Library Settings
- ☒ Access Staff Picks
- ☒ Access to Notifications
- ☒ Access to Edit Logo
- ☒ Access to Reservations
- ☒ Access to Patron/Student Management
- ☒ Admin Management
- ☒ Access to Reports
- ☒ Access to Reviews
- ☒ Access to File Upload
- ☒ Access to Customize Magicwall

[Change Password](#) 4

2. Flag a user as Inactive by unchecking the **Active** box.

3. Adjust **Permissions** as necessary. Note: The Master Admin ID can't adjust their own permissions. They can only change the password. However, the Master Admin ID can adjust any other user setup.

4. Click on **Change Password** link to change the password for the associated user.

Note: In order to have the ability to create and add to Staff Pick's the staff member also needs access to "Library Settings". If these two are checked, then they will be able to create and add staff pick pages.

Permissions

- ☒ Access to Library Settings
- ☒ Access Staff Picks

2.3 Patron Management

For libraries using Prefix authentication, User Management enables the library to search for users and reset passwords. All authentication methods allow you to change a user's barcode or merge barcodes.

2.3.1 Reset a User's Password

You can reset a user's password. The user will then be notified of the new password.

⏪ ⚙ Settings - Patron Management

Number of Rows 25 ▼

Total patrons in the library: 133

1 Search By Barcode ▼ 🔍 Search 2 Clear

Barcode
Email Address

Actions	Barcode	Name	Email Address	Checkouts	Holds	Create Date
 	08978746546	John Smith	smithi@anylibrary.org	0	0	09/15/2014
 	08978456654	Milton James	james@testing.com	5	1	09/10/2014
 	08978545651	Mark Johnson	MJ@myemail.com	0	0	06/09/2014

1. After selecting Settings and Patron Management, search for a user by barcode or email address. Click the **Search By** drop-down arrow and select **Barcode** or **Email Address**. Enter the barcode or email address in the textbox.
2. Once the barcode or email address has been entered, click **Search** or press Enter.

⏪ ⚙ Settings - Patron Management

Number of Rows 25 ▼

Total patrons in the library: 133

Search By Barcode ▼ 🔍 Search  Clear

3  

Actions	Barcode	Name	Email Address	Checkouts	Holds	Create Date
 	08978746546	John Smith	smithi@anylibrary.org	0	0	09/15/2014

3. Click the **Reset** icon.

Reset Password

User name:
08978746546

Email Address:
smithi@anylibrary.org

New Password:
[Red callout 4 points to this field]

Confirm Password:
[Red callout 4 points to this field]

Email user ☒ [Red callout 5 points to this checkbox]

[Red callout 6 points to the 'Ok' button]

4. Enter the new password in the **New Password** and **Confirm Password** fields.
5. The Email user checkbox is selected by default. After you click OK, the user will receive an email containing the new password.
6. Click **OK**.

You will be returned to the User Management page and a confirmation message displays.

2.3.2 Change a User's Barcode

When changing a user's barcode, the user does not lose any titles currently checked out or current holds. These are transferred from the old barcode to the new barcode.

Settings - Patron Management

Number of Rows: 25

Total patrons in the library: 133

Search By: Barcode [Red callout 1 points to this dropdown]

Search [Red callout 2 points to this button] Clear

Actions	Barcode	Name	Email Address	Checkouts	Holds	Create Date
	08978746546	John Smith	smithi@anylibrary.org	0	0	09/15/2014
	08978456654	Milton James	james@testing.com	5	1	09/10/2014
	08978545651	Mark Johnson	MJ@myemail.com	0	0	06/09/2014

1. After selecting Settings and Patron Management, you may search for a user by barcode or email address. Click the **Search By** drop-down arrow and select **Barcode** or **Email Address**. Enter the barcode or email address in the textbox.
2. Once the barcode or email address has been entered, click **Search** or press Enter.

Settings - Patron Management

Number of Rows 25 Search By Barcode 08978746546 Search Clear

Total patrons in the library: 133

Actions	Barcode	Name	Email Address	Checkouts	Holds	Create Date
	08978746546	John Smith	smithj@anylibrary.org	0	0	09/15/2014

3. Click **Change Barcode** icon.

Settings - Patron Management - Change Patron Barcode

Current Patron

Current Barcode	08978746546		
User Name	John Smith	Email Address	smithj@anylibrary.org
Blio User Name	Acoustik User Name		
Active Checkouts	0	Active Holds	0

 New Barcode 045646546546 

No existing users found. New user will be created with this Barcode.

Cancel Change

4. Enter the **New Barcode** and click **Search**  to see if it already exists. If the barcode does not already exist, a message will indicate that a new user will be created.

5. Click **Change**.

Settings - Patron Management - Patron Barcode Change Confirmation

Patron Information

Barcode	mdindira		
User Name	mdindira	Email Address	indira.vundavalli@baker-taylor.com
Blio User Name	Acoustik User Name		
Active Checkouts	1	Active Holds	1

Active Checkouts

ISBN	Title	Author	Expire Date
9780763659936	Shadows on the Moon	Marriott, Zoe	10/11/2014

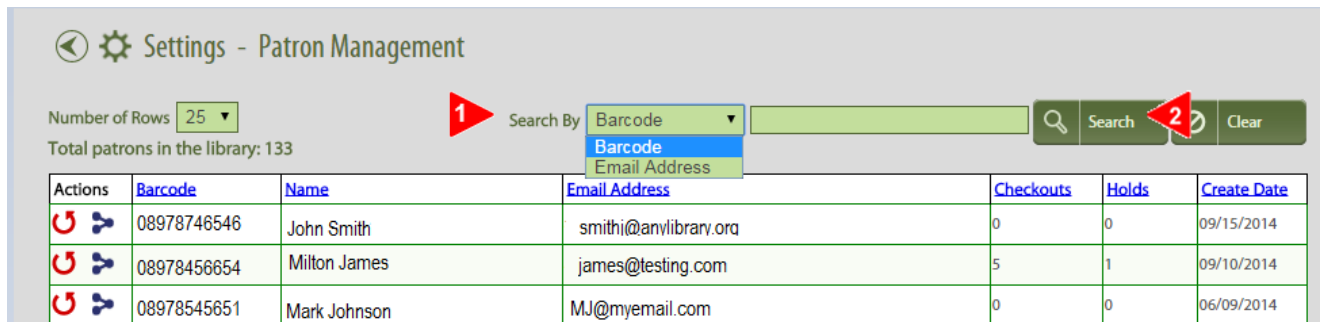
Finish

6. To view a list of the **Active Check outs** and **Active Holds** for the user, click the corresponding link.

7. Click **Finish**. The current user's information has been updated with the new barcode and the old barcode has been removed from the system.

2.3.3 Merge a User's Barcodes

When merging barcodes, the user does not lose any currently checked out titles or current holds. For example, if both accounts have the same title checked out, the one with the longer loan period is kept. In the case of active holds, the older hold is kept so the patron can get the title as soon as possible.



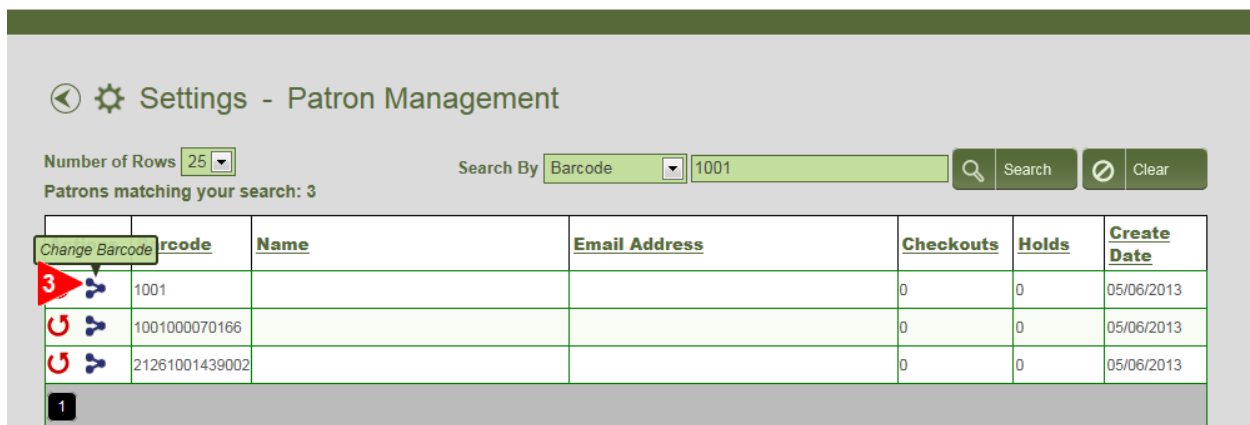
Settings - Patron Management

Number of Rows Total patrons in the library: 133

Search By

Actions	Barcode	Name	Email Address	Checkouts	Holds	Create Date
	08978746546	John Smith	smithi@anylibrary.org	0	0	09/15/2014
	08978456654	Milton James	james@testing.com	5	1	09/10/2014
	08978545651	Mark Johnson	MJ@myemail.com	0	0	06/09/2014

1. After selecting Settings and Patron Management, you may search for a user by barcode or email address. Click the **Search By** drop-down arrow and select **Barcode** or **Email Address**. Enter the barcode or email address in the textbox.
2. After entering the barcode or email address, click **Search** or press Enter.



Settings - Patron Management

Number of Rows Patrons matching your search: 3

Search By

	Barcode	Name	Email Address	Checkouts	Holds	Create Date
	1001			0	0	05/06/2013
	1001000070166			0	0	05/06/2013
	21261001439002			0	0	05/06/2013

3. Click **Change Barcode** icon.

⏪ ⚙ Settings - Patron Management - Change Patron Barcode

Current Patron

Current Barcode	1001
User Name	Email Address
Blio User Name	Acoustik User Name
Active Checkouts	0
Active Holds	0

4 New Barcode 

Existing Patron

Barcode	1001000070166
User Name	Email Address
Blio User Name	Acoustik User Name
Active Checkouts	0
Active Holds	0

 **5**   Merge Accounts

4. To change the barcode, enter the **New Barcode** and click the search icon. This will check to see if this Barcode already exists. If the barcode is new the message “No existing users found. New user will be created with this barcode.” Click “**Change**” This will change the users barcode to the newly created barcode. If a patron has two barcodes and you need to merge them into an existing account, enter the **New Barcode** (existing user’s barcode) and click **Search** .

5. Click **Merge Accounts**

⏪ ⚙ Settings - Patron Management - Patron Barcode Change Confirmation

Patron Information

Barcode	mdindira
User Name	mdindira
Email Address	indira.vundavalli@baker-taylor.com
Blio User Name	Acoustik User Name
6 Active Checkouts	6 Active Holds
1	1

ISBN	Title	Author	Expire Date
9780763659936	Shadows on the Moon	Marriott, Zoe	10/11/2014

 **7** Finish

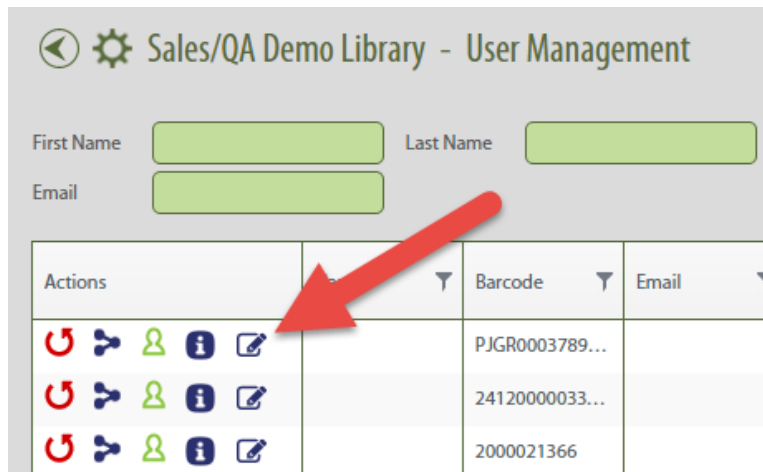
6. The barcodes have been merged. To view a list of the **Active Check outs** and **Active Holds** for the user, click the corresponding link.

7. Click **Finish**.

2.3.4 Deactivate a Prefix Verification Patron

You can now deactivate individual patron logins if you use Prefix Authentication.

1. A new **Edit Details** option has been added to the User Management page.



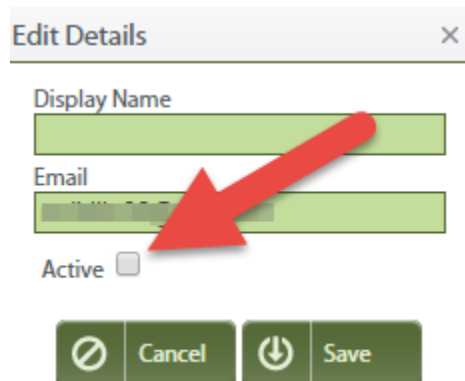
Sales/QA Demo Library - User Management

First Name Last Name

Email

Actions	Barcode	Email
	PJGR0003789...	
	24120000033...	
	2000021366	

2. The Edit Details page displays. Uncheck **Active** to deactivate login for the associated patron. Additionally, you can edit the user's **Display Name** or **Email** address on file if you wish.



Edit Details

Display Name

Email

Active ☒

Cancel Save

3. Click **Save**.
4. Patrons who have a disabled account will receive an error message when they attempt to log in to the Axis 360 site, indicating that their account has been disabled and to contact the library for more information.

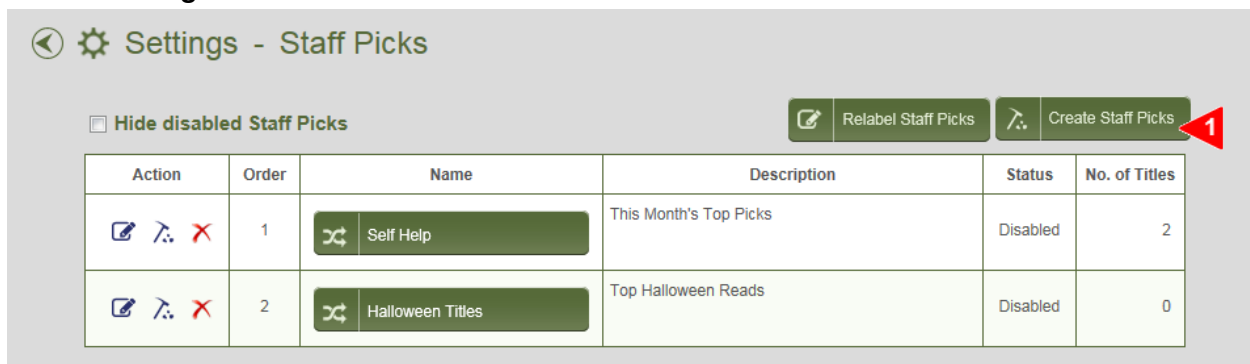
2.4 Staff Picks



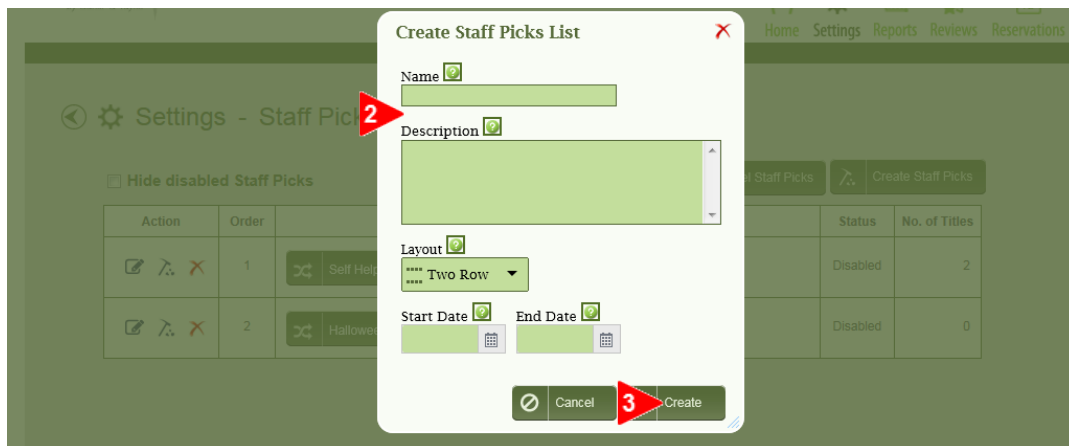
With Staff Picks, you can showcase selected titles from your collection. Your patrons will see this section when they first log onto Axis 360 if you set it as the Landing Page under Settings > Library Site Settings.

You may create an unlimited amount of Staff Picks collections. These collections can also be enabled, disabled, renamed or saved.

2.4.1 Adding a Collection to Staff Picks



1. After selecting Settings and Staff Picks, click **Create Staff Picks**.



2. Enter the **Name**, **Description**, **Layout**, **Start Date**, **End Date**.

3. Click **Create**. A confirmation message will appear.



Once the Staff Pick has been created you will need to enable it for viewing by clicking on the  Edit icon

⏪ ⚙ Settings - Staff Picks

☐ Hide disabled Staff Picks

Relabel Staff Picks Create Staff Picks

Action	Order	Name	Description	Status	No. of Titles
	1	Self Help	This Month's Top Picks	Disabled	3
	2	Halloween Titles	Top Halloween Reads	Disabled	0
	3	Top Titles	Drag and Drop for re-ordering.	Disabled	0

4. To order the collections on the Staff Picks page, hover over your selection. Using the mouse, left-click and hold down the mouse button. Drag the collection to the desired location. Release the left mouse button to drop the collection. Click on Edit to enable or disable a Staff Pick.

2.4.2 Adding Titles to a Collection

⏪ ⚙ Settings - Staff Picks

☐ Hide disabled Staff Picks

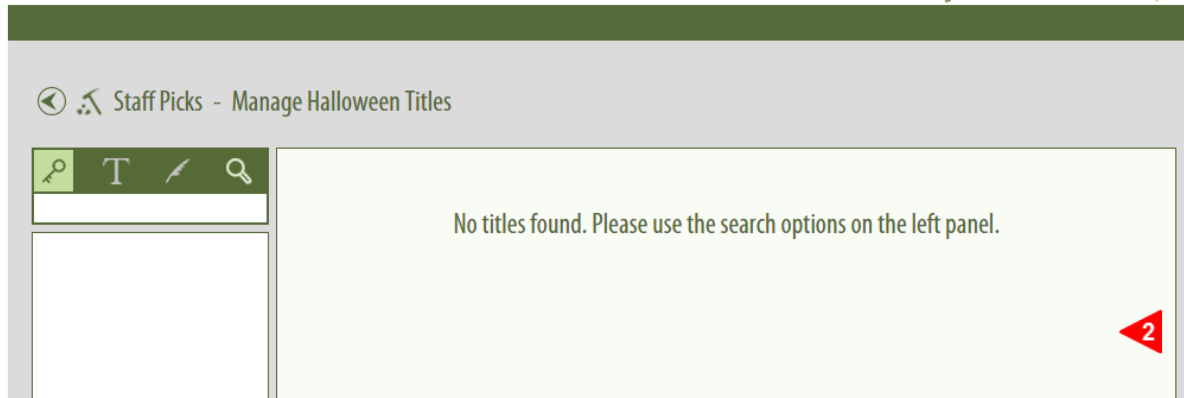
Relabel Staff Picks Create Staff Picks

Action	Order	Name	Description	Status	No. of Titles
	1	Self Help	This Month's Top Picks	Disabled	3
	2	Halloween Titles	Top Halloween Reads	Disabled	0
	3	Top Titles		Disabled	0

1. In the Action column next to the desired collection, click the icon for **View/Manage Staff Picks**.

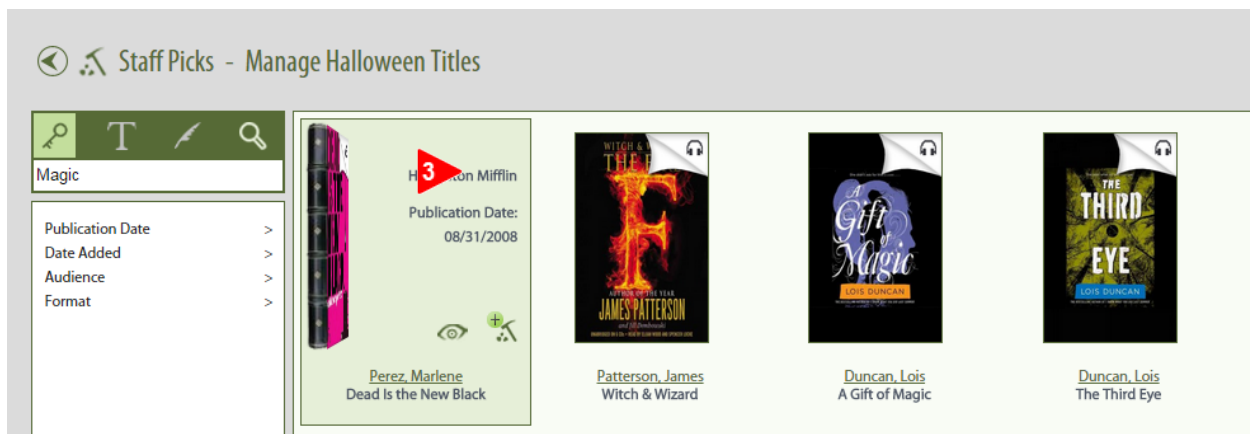


To remove a collection, click the name of the collection and the Remove button.



You will be taken to your library's **Staff Picks Manage** page. From here, search or browse your Axis 360 repository by Keyword, Title or Author using the Search icon to identify and select titles for your new Staff Picks collection. You can choose an unlimited amount of titles to add to your collection.

2. Within the Staff Picks Manage view, after doing a search, you will see the titles that match your criteria. To add a title to the collection, click the drop-down arrow, select the **Collection** you would like to add the title to and click **Add**.



3. To add a title to the collection, move your mouse over the jacket image. This will make the jacket swing open to review additional options. Click on the "Add to Staff Picks" option.

Success

Title (Dead Is the New Black) Added to Halloween Titles successfully.

A confirmation message displays after each title is selected.

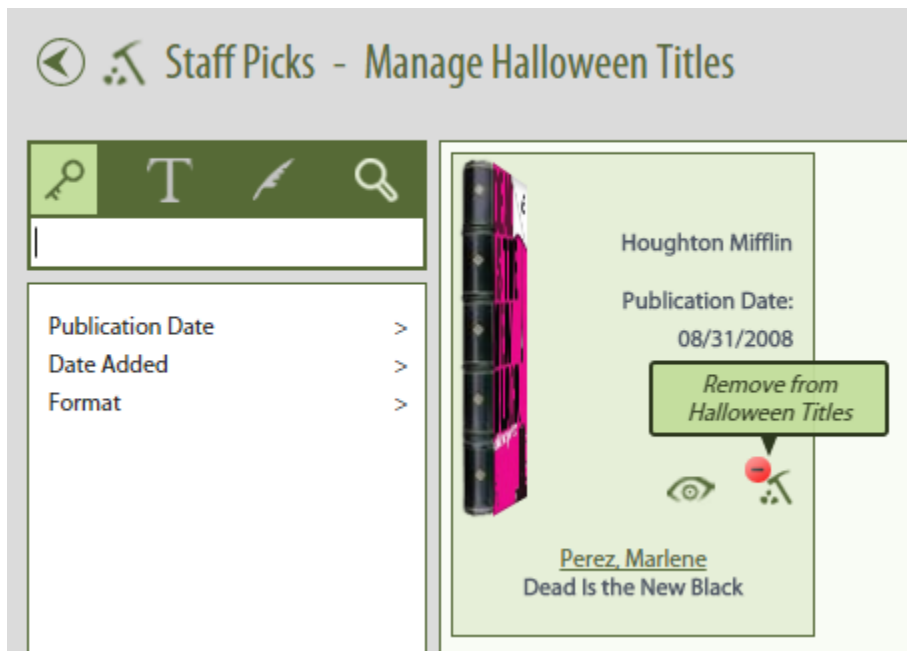
Continue searching and selecting titles until you have completed your collection.

 Staff Picks - Manage Halloween Titles

4. After all the titles are selected, click the Back icon to return to the Staff Picks menu.

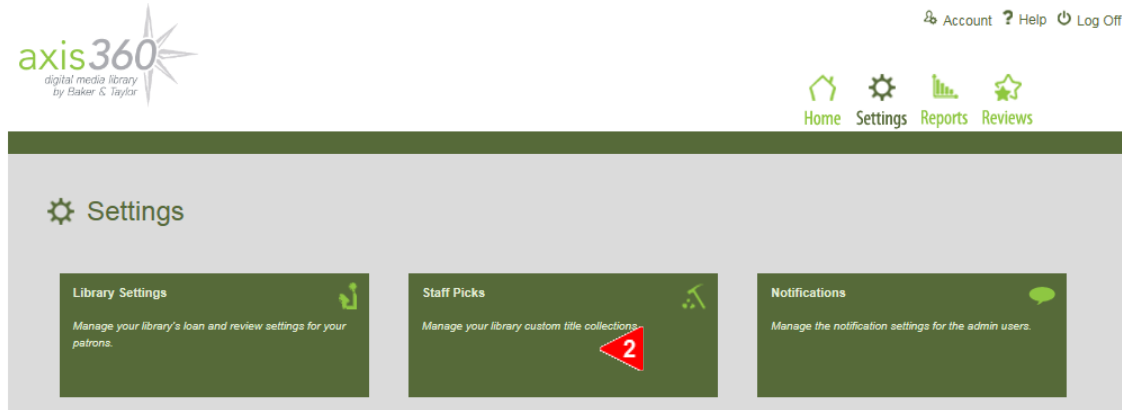


The screen layout may be changed at any time by clicking the desired option to the left of the Search icon located in the top right corner of the screen.

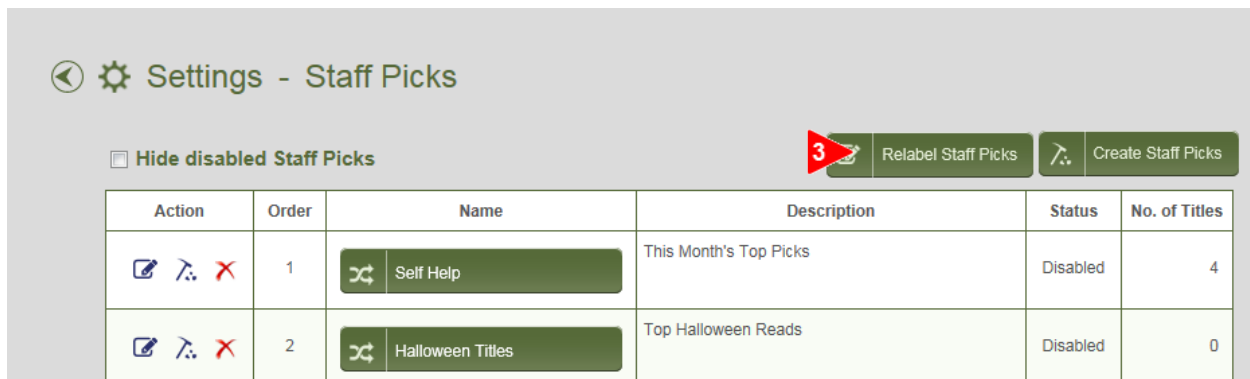


5. If a title was added by mistake, click the **Remove** icon. The title will be removed from the Staff Pick collection.

2.4.3 Relabel Staff Picks

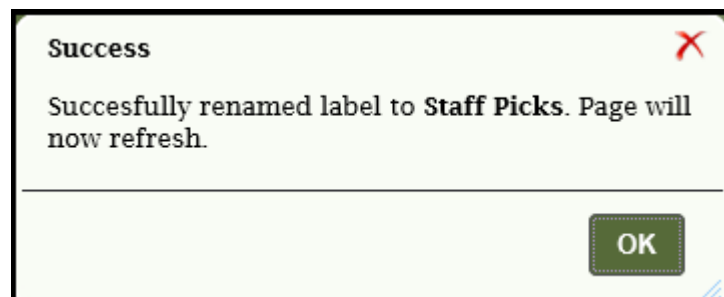


1. Click **Settings**.
2. Click **Staff Picks**.



3. Click **Relabel Staff Picks** and enter the new name for Staff Picks in the textbox.

After the new label has been entered, click the button and a confirmation message will appear. Close the confirmation message.



The label has been changed on the site.

2.5 Customize Magic Wall

With Customize Magic Wall, you can select the categories you want to display in the Left navigation area of the Magic Wall. You may also create, edit, enable, disable and order categories in the sequence you prefer. You may also rename categories.



2.5.1 Adding a Category to the Magic Wall

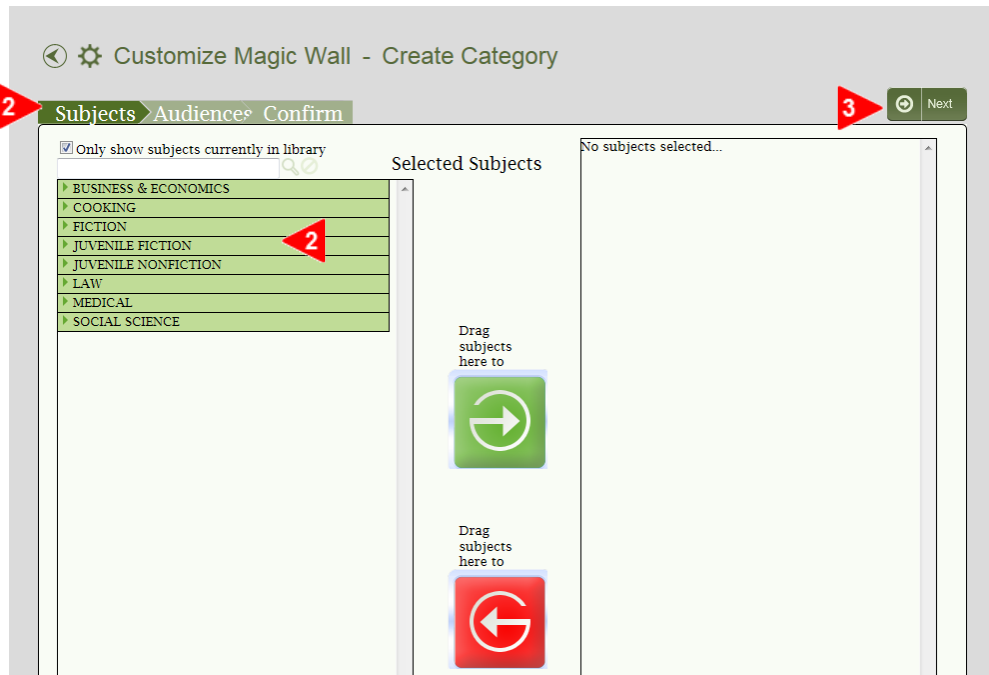
1. After selecting Settings and Customize Magic Wall, click **Create Category**.

⚙ Settings - Customize Magic Wall

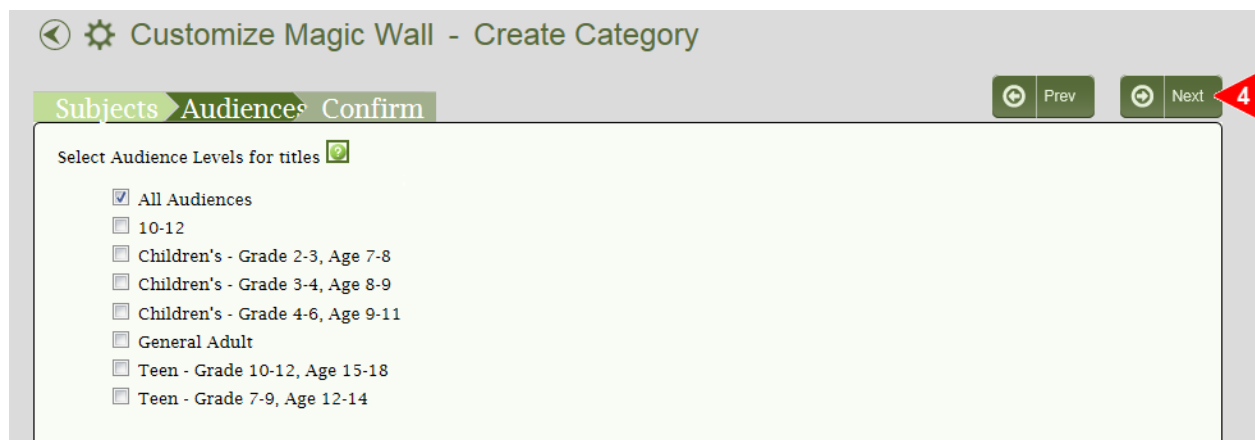
☐ Hide disabled Category

Create Category **1**

Action	Order	Name	Status	# of Titles	Default Category?
	1	Teens	Disabled	272	Yes
	2	Children	Enabled	95	Yes
	3	Featured	Disabled	1597	Yes
	4	Fiction	Disabled	709	Yes
	5	Non-Fiction	Disabled	521	Yes



2. Under the **Subjects** tab, select the subjects you want to include in the category you are creating and drag and drop them into the right hand column. You may also use the Green Right Arrow icon to select highlighted subjects. To delete, simply drag and drop into the left hand column or highlight and click on the Red Left Arrow.
3. Click next to move to the **Audience** Tab (you may also click on a tab at any time to jump to that section). Select from the list of Audiences to be included in the category.



4. Click next to move to the **Confirm** tab.

Customize Magic Wall - Create Category

Subjects > Audience > Confirm

Category Name	My Category	(*)	5
Access Key	a		
Titles in Category	1		
Display Category to Patrons	☐		6

- Enter a Category Name and Access Key (This key allows a user using a screen reading software to directly access this content. This key must be unique to each category list.)
- The system will display the number of titles in the category (based on selections at **Subjects** and **Audience**). Click the checkbox if you want the category to be visible to Patrons.

After the new category has been entered, click the create button and a confirmation message will appear. Close the confirmation message.

Category Created

New Category **My Category** created successfully.

OK



Tip

To disable/enable a category go directly to the confirm tab and either check or uncheck the "Display Category to Patrons" box.

⚙ Settings - Customize Magic Wall

 Create Category

☐ Hide disabled Category

Action	Order	Name	Status	# of Titles	Default Category?
  	1	 Social Awareness	Enabled	2	No
 	2	 Featured	Disabled	32	Yes
 	3	 Fiction	Disabled	12	Yes
 	4	 Non-Fiction	Enabled	5	Yes
 	5	 Children	Enabled	7	Yes
 	6	 Teens	Enabled	8	Yes
  	7 	 My Category	Disabled	1	No

The screen will refresh and the category you have created will display in the list and on the Magic Wall (if the checkbox has been selected to “Display to Patrons”).



Tip

A default category of “Yes” can’t be deleted or changed (only disabled)

2.5.2 Change the Category display order on the Magic Wall.

⏪ ⚙ Settings - Customize Magic Wall

☐ Hide disabled Category Create Category

Action	Order	Name	Status	# of Titles	Default Category?
  	1	 Social Awareness	Enabled	2	No
 	2	 Featured	Disabled	32	Yes
 	3	 Fiction	Disabled	12	Yes

Drag and Drop for re-ordering.

1. To change the category display order, simply click, drag and drop in the order you want them to display.

2.5.3 Edit a Category

⏪ ⚙ Settings - Customize Magic Wall

☐ Hide disabled Category Create Category

Action	Order	Name	Status	# of Titles	Default Category?
  	1	 Featured	Disabled	32	Yes
  	2	 Social Awareness	Enabled	2	No

1. To edit a category, click on the “Edit Category” icon. You may then make changes and save.
2. To manage/view a category, click on the “Manage/View” icon. This will open the Category on the Magic Wall in a new browser window.
3. To delete a non “Default” category, click on the delete icon.

2.5.4 Disable a Category

Settings - Customize Magic Wall

☐ Hide disabled Category Create Category

Action	Order	Name	Status	# of Titles	Default Category?
1  	1	 Teens	Enabled	1320	Yes
 	2	 Featured	Enabled	17101	Yes
 	3	 Fiction	Enabled	3535	Yes

1. To disable a category, click on the “Edit Category” button.

axis360
digital media library
by Baker & Taylor

Home Settings Reports Reviews

Customize Magic Wall - Edit Category

Subjects Audiences Confirm 2

☒ Only show subjects currently in library

Selected Subjects

FICTION
JUVENILE FICTION

ANTIQUE & COLLECTIBLES
ARCHITECTURE
ART
BIBLES
BIOGRAPHY & AUTOBIOGRAPHY
BODY, MIND & SPIRIT
BUSINESS & ECONOMICS

2. This will open the “Edit Category” option. Click on the last tab “Confirm”.

Customize Magic Wall - Edit Category

Subjects Audience Confirm

Category Name  Fiction (*)

Access Key  i

Titles in Category  3535

Display Category to Patrons ☒

 Cancel  Apply 4

3. Uncheck the box next to “Display Category to Patrons”.
4. Click Apply.

2.6 Barcode Management: File Upload

Non-automated libraries that have been flagged by BT Admin with this ability will have access to a File Upload section within the Settings page. Only one option, **User File**, will display in the **Upload a File** section. This will let you upload a file of users who have access to your digital collection. Any user accessing the system who is not included in the file will be denied access.

Settings - File Upload

Upload A File

User File

Browse...

Upload A File

Download Template

Summary

	Total	Inserted	Updated	Deleted	Errored
Users	298	0	0	0	0

Data

Users

Existing

Inserted

Deleted

Updated

Error

	Username	Password	First Name	Middle Name	Last Name	Active	Email Address	Phone Number		Desc
Existing	AHABRAMS	Axis360Stu	QUADIR		ABRAMS	Yes	Student1@testorg.com			
Existing	AHAKTER	Axis360Stu	SUMI		AKTER	Yes	Student1@testorg.com			
Existing	AHAI AM	Axis360Stu	IETE		AI AM	Yes	Student1@testorg.com			

3 Reports

Create and download inventory, circulation, holds and user reports. Each report is described on the page and a sample of the report format displays when you hover over the report name.

The screenshot shows the axis360 Reports page. At the top left is the axis360 logo. At the top right are links for Account, Help, and Log Off. Below these are navigation icons for Home, Settings, Reports (highlighted), Reviews, and Reservations. The main content area is titled 'Reports' and contains a grid of 9 report cards, each with a title, a brief description, and a small bar chart icon.

Report Name	Description
Inventory List Report	Gives the details of your current inventory & current number of holds/checkouts on the titles.
Circulation List Report	Gives the details of current circulation of titles in your inventory.
Hold Report	Gives the details of titles currently on hold.
Inventory Circulation By Month	Gives the details of circulation of titles in the given month.
Top 10 Circulating Subjects	Graphical presentation of top 10 subjects circulated in the given time.
User Review Report	Gives the details of reviews of the users for the titles.
New Users By Month	Gives the details of new users in the particular month.
Total Users By Month	Gives the details of total users in the particular month.
New Users By Month Graph	Graphical presentation of new users in the particular month.

3.1 Available Reports

When running reports, select the button for the desired report and select the parameters.

3.1.1 Inventory List Report

Inventory List Report: The inventory report provides information of all titles currently owned by the libraries, including attributes such as quantity purchased, total checkouts, current holds, subjects, audience, formats, etc).

- As a consortia group, use the “Library” menu option to view an inventory report for specific libraries or all.
- Select desired parameters including: Subjects, Formats (Audio/eBooks), Audience and Purchase Date Ranges to customize the inventory report for the library’s need.

Library		Subject	All
Format	Audio Book, eBook	Audience	All
Purchase Date From	☐ NULL	To	11/11/2014 ☐ NULL
Summary	☒ Yes ☐ No		
View Report			

- Summary Report:** The Summary Report provides the library a high level numeric count of the number of quantities owned and the number of current holds. Select “Yes” to view the Summary only report.

(Inventory Report)

Inventory List Report

Title	Author	Publication Date	Publisher	Audience	Date Added	Format	Quantity Owned	Total Checkouts
Dolly : The First Cloned Sheep	Dunn, Joeming	08/01/2011	Abdo Pub Co	Children's - Grade 3-4, Age 8-9	03/16/2013	eBook	1	
Mastermind Plot	Frazier, Angie	03/01/2012	Scholastic	Children's - Grade 4-6, Age 9-11	11/20/2012	eBook	3	1
Things That Matter	Berkus, Nate	10/16/2012	Random House Digital	General Adult	11/02/2012	eBook	3	16

(Inventory Summary Report)

Quantity Owned	Total Checkouts	Turns	Days to Turn	Holds	Hold Ratio
9528	15642	1.64	397.32	27	0.00

3.1.2 Circulation List Report

Circulation Report: The Circulation Report provides information of the circulation statistics for the titles within the existing collection. This report will provide information about checkouts by format (including Blio, ePub, PDF, Acoustik). This report also includes the current hold statistics.

- As a consortia group, use the "Library" menu option to view a circulation report for specific libraries or all.
- Select desired parameters including: Subjects, Formats, Audience, Circulation Date Ranges

Subject	All	Audience	All
Format	Audio Book, eBook	Circulation Date From	☒ NULL
To	12/29/2014	Publisher	All
Summary ☐ Yes ☒ No			
View Report			

- Summary Report:** The Summary Report provides the library a high level numeric count of the quantity owned per title, number of checkouts and the number of current holds. Select "True" to view the Summary only report.

(Circulation Report)

Library Name	Subject	ISBN	Title	Author	Publication Date	Publisher	Audience	Date Added	Total Quantity	Member Quantity	Parent Quantity	Total Checkouts
Sales Demo Library	JUVENILE NONFICTION / Biography & Autobiography / Historical	9781575053622	George Washington Carver	Carter, Andy ; Saller, Carol ; Paladino, Lance (ILT)	8/1/2000	Lerner Pubns	Children's - Grade 3-4, Age 8-9	8/6/2012	1	1	0	2
Sales Demo Library	BIOGRAPHY & AUTOBIOGRAPHY / Cultural Heritage; SOCIAL SCIENCE / Ethnic Studies / African American Studies	9780679640165	Up from Slavery	Washington, Booker T.	6/11/1999	Random House Digital	Scholarly/Undergraduate	8/6/2012	2	2	0	1
Sales Demo Library	JUVENILE NONFICTION / Cooking & Food	9780822505365	Cooking the Mexican Way : Revised and Expanded to Include New Low-Fat and Vegetarian Recipes	Coronado, Rosa	8/1/2001	Lerner Pubns	Children's - Grade 4-6, Age 9-11	8/6/2012	1	1	0	1

(Circulation Summary Report)

Circulation List Report

Library Name	Total Quantity	Member Quantity	Parent Quantity	Total Checkouts	Blio Checkouts	ePub Checkouts	PDF Checkouts	Acoustik Checkouts	Turns	New Holds	Total Holds	Reserves	Checkouts From Reserves
Sales Demo Library	7993	7989	4	14831	8990	3411	706	1724	1.86	619	619	485	63
Grand Total	7993	7989	4	14831	8990	3411	706	1724	1.855	619	619	485.00	63.00

3.1.3 Hold List Report

Hold Report: The Hold Report provides information to review the titles within the library collection along with the number of holds in the queue. Information such as title and ISBN are available for easy ordering of additional copies for the library collection.

- As a consortia group, use the "Library" menu option to view a hold report for specific libraries or all.
- Select desired parameters including: Subjects; Format (Audio/ eBook); Audience

Subject: Format:
 Audience: Summary: ☐ Yes ☒ No

- Summary Report: The Summary Report provides information related to the title quantity and current hold quantity within the collection. Select "True" to view the Summary only report.

(Hold Report)

Hold List Report

Library Name	BISAC Subject	ISBN	Title	Author	Publication Date	Publisher	Audience	Date Added	Format	Total Quantity	On Order Quantity
Sales Demo Library	HUMOR / General; REFERENCE / Personal & Practical Guides	9780761178873	Official Fithy Rich Handbook	Tennant, Christopher	5/1/2015	Workman Pub Co	General Adult	4/10/2014	eBook	0	1
Sales Demo Library	HEALTH & FITNESS / Healthy Living; HEALTH & FITNESS / Body Cleansing & Detoxification; HEALTH & FITNESS / Diet & Nutrition / Diets	9780062310620	Rockstar Remedy : A Rock-and-roll Doctor's Prescription for Living a Long, Healthy Life	Francis, Gabrielle, Dr. ; Baker, Stacy	12/30/2014	HarperCollins	General Adult	11/20/2014	eBook	0	1
Sales Demo Library	SELF-HELP / Motivational & Inspirational; SELF-HELP / Personal Growth / General	9780698154377	Inspirational Atheist : Wise Words on the Wonder and Meaning of Life	Jackson, Buzzy	12/30/2014	Penguin USA	General Adult	11/20/2014	eBook	0	1
Sales Demo Library	FICTION / Mystery & Detective / Women Sleuths	9781616954789	Bishop's Wife	Harrison, Mette Ivie	12/30/2014	Random House Digital Dist	General Adult	10/14/2014	eBook	0	2
Grand Total										0	5

(Hold Summary Report)

Hold List Report

Library Name	Total Quantity	On Order Quantity	Member Quantity	Parent Quantity	Current Circulation	Reserves	Current Holds	Hold Ratio
Sales Demo Library	0	5	0	0	0	0	5	1.00
Grand Total	0	5	0	0	0	0	5	1.00

3.1.4 Inventory Circulation by Month

Inventory Circulation by Month: The Inventory Circulation by Month graph provides information related to the number of checkouts for the month. The details provided are a cumulative total for the formats selected.

- As a consortia group, use the "Library" menu option to view a circulation by month graph for specific libraries or all.
- Select desired parameters including: Report Year; Format

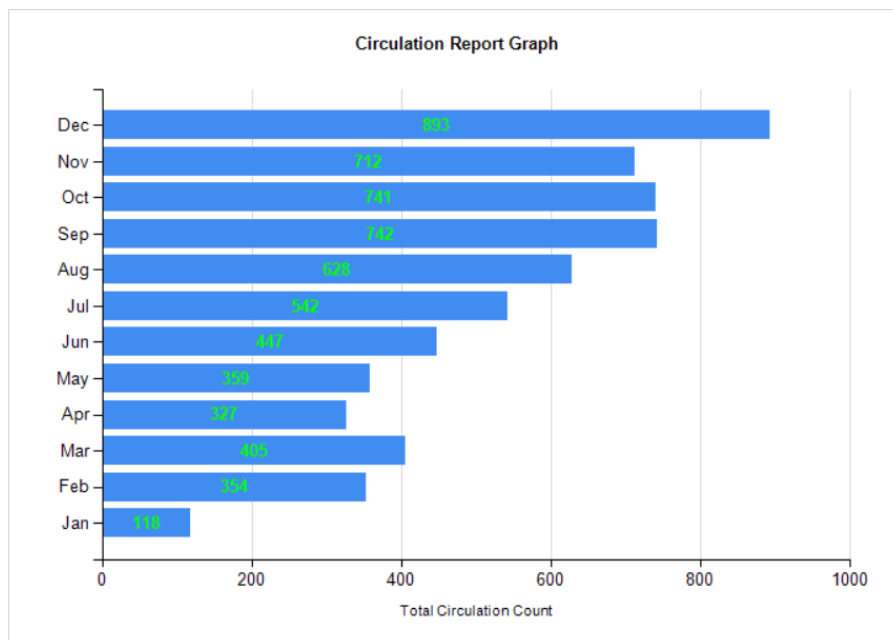
Report For Library

Report For Year

View Report

Format

(Circulation by month graph)



3.1.5 Top 10 Circulating Subjects

Graph of Top 10 Circulation Subjects: Begin by selecting the format(s) and circulation date range to review. The Top 10 Circulating Subjects provides information related to the circulation numbers of the top circulating subject areas of the collection.

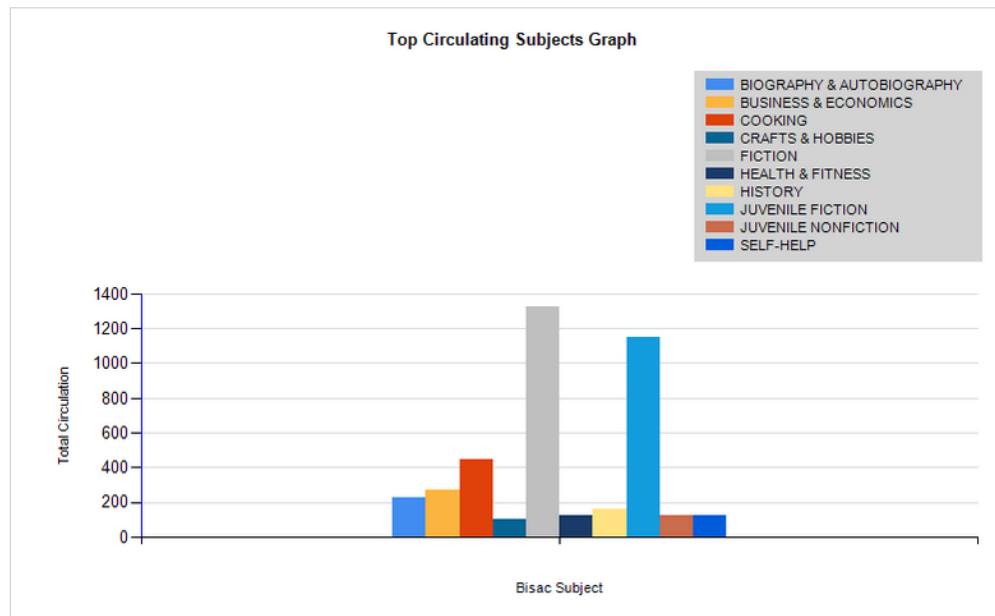
- As a consortia group, use the "Library" menu option to view a circulation by subject graph for specific libraries or all.
- Select desired parameters including: Format; Circulation Date Range

Report For Library Format ID

Circulation Date From To

[View Report](#)

(Circulation by subject graph)



3.1.6 User Review Report

User Review Report: The User Review Report provides a list of titles within the library's collection with library patron reviews attached.

- As a consortia group, use the "Library" menu option to view a user review listing for specific libraries or all.
- Select desired parameters including: Format; Review Date Ranges

Library Format View Report

Review Date From To 11/18/2013 9:31:45 AM

(User Review Report)

User Review Report															
ISBN	Item ID	Title	Author	Bisac Desc	Publisher	Format Name	Total Circulation	Current Circulation	Turns	Days To Turn	Quantity Owned	Added Date	Pub Date	Current Holds	Number Of Reviews
9780061991943	0009330200	Golden Web	Quick, Barbara	JUVENILE FICTION / Girls & Women; JUVENILE FICTION / Health & Daily Living / General; JUVENILE FICTION / Historical / Medieval	HarperCollins	ebook		0		407	1	8/6/2012	4/6/2010	0	1
9780062011527	0009139374	747 : Creating the World's first Jumbo Jet and Other Adventures from a Life in Aviation	Sutter, Joe ; Spenser, Jay P.	BIOGRAPHY & AUTOBIOGRAPHY / Historical	HarperCollins	ebook		0		407	1	8/6/2012	8/3/2010	0	1

3.1.7 New Users by Month

New Users By Month: This report provides an overview of the **newly** registered library patrons accessing the Axis 360 collection.

- As a consortia group, use the "Library" menu option to view a list of new users for specific libraries or all.
- Select the desired libraries to review; if necessary; select a specific time frame for the report.

Library From Date ☒ NULL View Report

To Date ☒ NULL

(New User per Month summary display)

Expand/Collapse the library details using the "+" / "-" option.

New Users Per Month

Date Range: Created Date :11/18/2013 9:42:08 AM

SUMMARY REPORT

Library Name	Month Of Year	Bar Code	Life Time Checkouts	Life Time eBook Checkouts	Life Time Audio Checkouts	Life Time Hold	Active Holds	Create Date	Last Checkout Date
Ames Free-Easton	Total by Library	1	0	0	0	0	0	11/1/2013	
Lucius Beebe Memorial Library	Total by Library	1	0	0	0	0	0	11/1/2013	
Middlesex Community College	Total by Library	4	4	4	0	0	0	11/14/2013	11/14/2013
Salem State University Library	Total by Library	1	0	0	0	0	0	11/1/2013	
Wilkins Library Cape Cod Community College	Total by Library	1	0	0	0	0	0	11/9/2013	
Worcester Polytechnic Institute	Total by Library	3	0	0	0	0	0	11/12/2013	
Grand Total		11	4	4	0	0	0	11/14/2013	11/14/2013

(New Users per Month expanded view)

New Users Per Month

Date Range: Created Date :11/18/2013 9:42:08 AM

Ames Free-Easton

Month Of Year	Bar Code	LifeTime eBook Checkouts	LifeTime Audio Checkouts	Life Time Checkouts	Life Time Holds	Active Holds	Create Date	Last Checkout Date	Last Hold Date
November 2013	23576000066490	0	0	0	0	0	11/1/2013		

Lucius Beebe Memorial Library

Month Of Year	Bar Code	LifeTime eBook Checkouts	LifeTime Audio Checkouts	Life Time Checkouts	Life Time Holds	Active Holds	Create Date	Last Checkout Date	Last Hold Date
November 2013	21111000005108	0	0	0	0	0	11/1/2013		

3.1.8 Total Users by Month

Total Users by Month: This report provides an overview of **all** registered library patrons accessing the Axis 360 collection.

- As a consortia group, use the "Library" menu option to view a list of new users for specific libraries or all.
- Select the desired libraries to review; if necessary; select a specific time frame for the report.

Library From Date ☒ NULL View Report

To Date ☒ NULL

(Total User per Month summary display)

Expand/Collapse the library details using the "+" / "-" option.

11/18/2013 9:57:31 AM

Total Users per Month

SUMMARY REPORT

Library Name	Month Of Year	Bar Code	Is New User	Total Checkouts	Total EBook Checkouts	Total Audio Checkouts	Holds	Review	Create Date	Last Checkout Date
Ames Free-Easton	Total by Library		1	0	0	0	0	0	11/1/2013	
Lucius Beebe Memorial Library	Total by Library		1	0	0	0	0	0	11/1/2013	
Middlesex Community College	Total by Library		4	4	4	0	0	0	11/14/2013	11/14/2013
Salem State University Library	Total by Library		1	0	0	0	0	0	11/1/2013	
Wilkins Library Cape Cod Community College	Total by Library		1	0	0	0	0	0	11/9/2013	
Worcester Polytechnic Institute	Total by Library		3	0	0	0	0	0	11/12/2013	
Grand Total			11	4	4	0	0	0	11/14/2013	11/14/2013

(Total Users per Month expanded view)

Document Map

- TotalUsersByMonth.pdf
- Ames Free-Easton
- 2013 November
- Lucius Beebe Memorial Library
- Middlesex Community College
- Salem State University Library
- Wilkins Library Cape Cod Community College
- Worcester Polytechnic Institute
- Grand Total

Date Range: Create Date: 11/18/2013

Expand/Collapse library & monthly detail view to include checkout statistics by user barcode/ID using the "+" / "-" option.

Total Users per Month

Month Of Year	Bar Code	Is New User	Total Checkouts	Total EBook Checkouts	Total Audio Checkouts	Holds	Review	Create Date	Last Checkout Date
2013 November	23576000066490	Yes	0	0	0	0	0	11/1/2013	
Lucius Beebe Memorial Library									
Month Of Year	Bar Code	Is New User	Total Checkouts	Total EBook Checkouts	Total Audio Checkouts	Holds	Review	Create Date	Last Checkout Date
2013 November	21111000005108	Yes	0	0	0	0	0	11/1/2013	

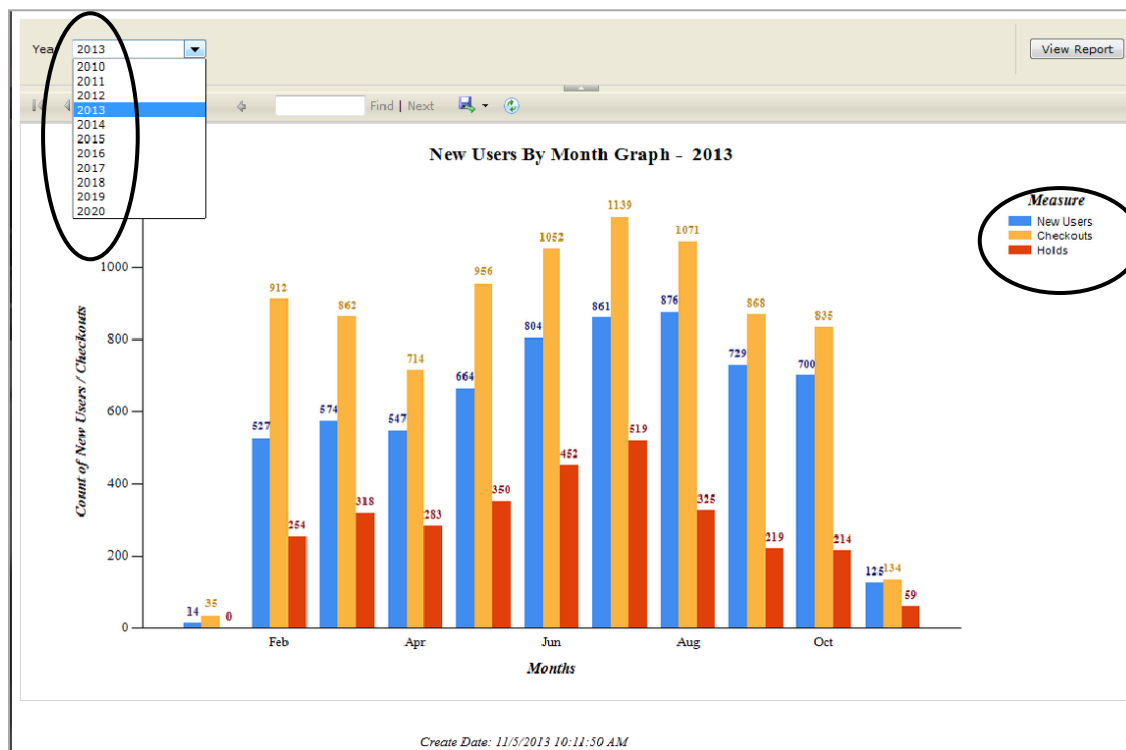
3.1.9 New Users by Month Graph

New Users by Month Graph: The New Users by Month graph provides a visual depiction of how many new users have been created, checkouts completed and holds within the months of a chosen year.

- As a consortia group, use the “Library” menu option to view a list of new users for specific libraries or all.
- Select the desired libraries to review and year to review

Library Year <Select a Value>

(New Users per Month graph)



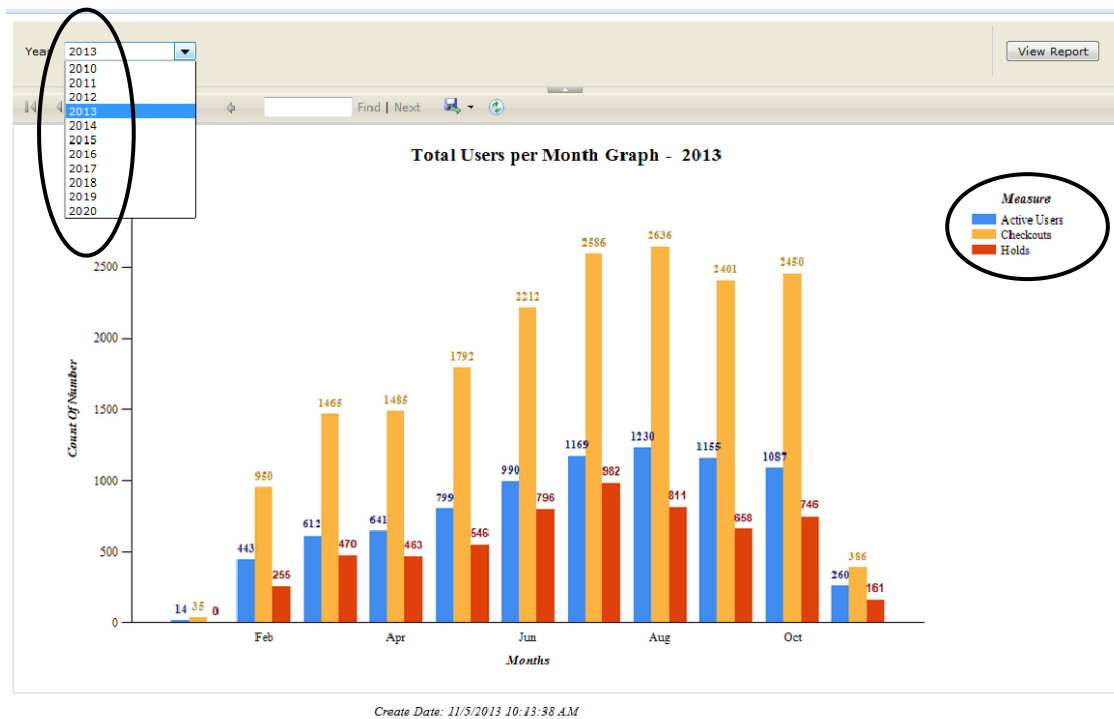
3.1.10 Total Users by Month Graph

Total Users by Month Graph: The Total Users by Month graph provides a visual depiction of how many total active users exist, checkouts completed and holds within the months of a chosen year.

- As a consortia group, use the “Library” menu option to view a list of new users for specific libraries or all.
- Select the desired libraries to review and year to review

Library Year <Select a Value>

(Totals Users per Month graph)



3.1.11 Active User Report

Active User Report: The active user report provides information on the Total Patrons that are new users and Active Users.

- a) Select desired date parameters.

From Date ☒ NULL To Date ☐ NULL

[View Report](#)

Active Users Report

Date Range: To 12/29/2014
Create Date: 12/29/2014 10:27:49 AM

Library Name	Month Of Year	Total Patrons	Active Users	New Users	Total Checkouts
☒ Polk Co Liby	Total by Library	10	3	10	6
Total		10	3	10	6

3.1.12 Adoption by Month Report

Adoption by Month Report: The adoption by month report provides a summary of total patrons and new adoptions for the time period selected along with type of adoption (iOS or Android).

- a) Select desired date parameters.

From Date ☒ NULL To Date ☐ NULL

[View Report](#)

1 of 1 Find | Next

Total Adoption per Month

Date Range: To 12/29/2014
Create Date: 12/29/2014 10:41:36 AM

Library Name	Month Of Year	Total Patrons	Total Adoption	OS	Android
☒ Demo Library	Total by Library	1366	172	109	63
Grand Total		1366	172	109	63

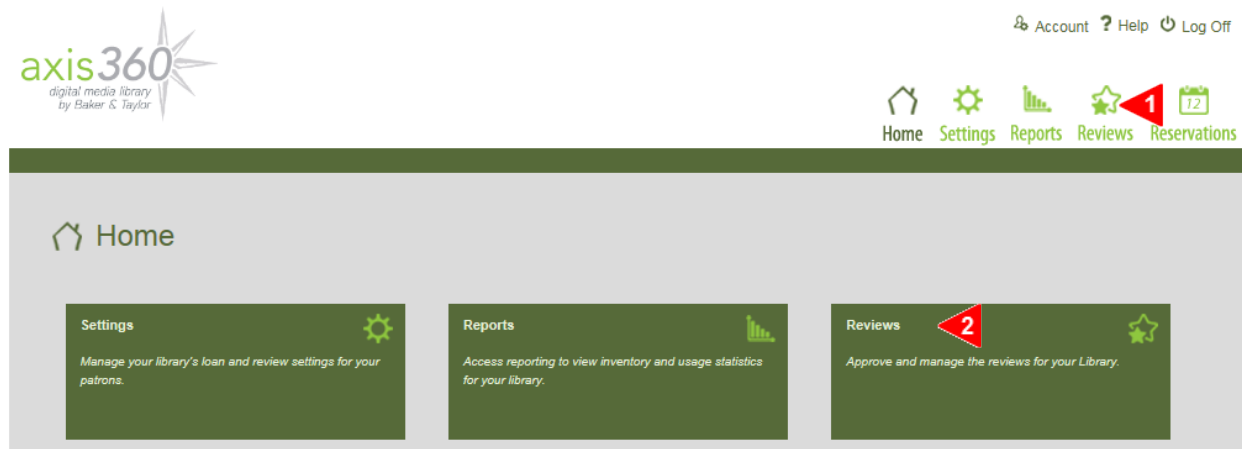
4 Reviews

Using the options under Settings > Library Settings, you can control the site display which includes if reviews are enabled on your site. If your reviews are enabled, the functionality below is available.

4.1 Reviews

You have access to user title reviews, which must be approved before they are visible on the site. The text cannot be edited; reviews are either approved or rejected in full.

4.1.1 Approve or Delete Reviews



1. Reviews may be accessed by clicking **Reviews** or **Home** from the main menu.
2. Click **Reviews**.

Reviews - Reviews

Reject All Approve All

Actions	Review Date	Title	User Name	Review	Rating
4	10/17/2014	Robe of Skulls		A great Halloween Read!	4
5	2014	Toby Alone	3	This was a good and fast read. It was a little ha ...Read More	4

Now showing 1 - 2 of 2 5 per page

All pending reviews submitted by users will display. Reviews can be approved or deleted. If a review is approved, it will then display on the site.

- To read a complete review, click the **Read More** hyperlink to open the complete review.
- To approve a review, click the **Approve** icon.
- To reject a review, click the **Reject** icon.



To approve all reviews at once, click the **Approve All** button.

Magic Wall App Zone Browse By Subject Staff Picks Switch Library

Overview Details **Reviews**

Average Reader Rating: ★★★★★ (1 Review)

Reader Reviews:

Mary Miles

This is a great book that helped us plan our trip this summer.

[Read Full Review](#)

Fodor's

MADRID
AND SIDE TRIPS

Copies

Owned 2

Available 2

Subjects

Travel

Select a format

Add

Checkout

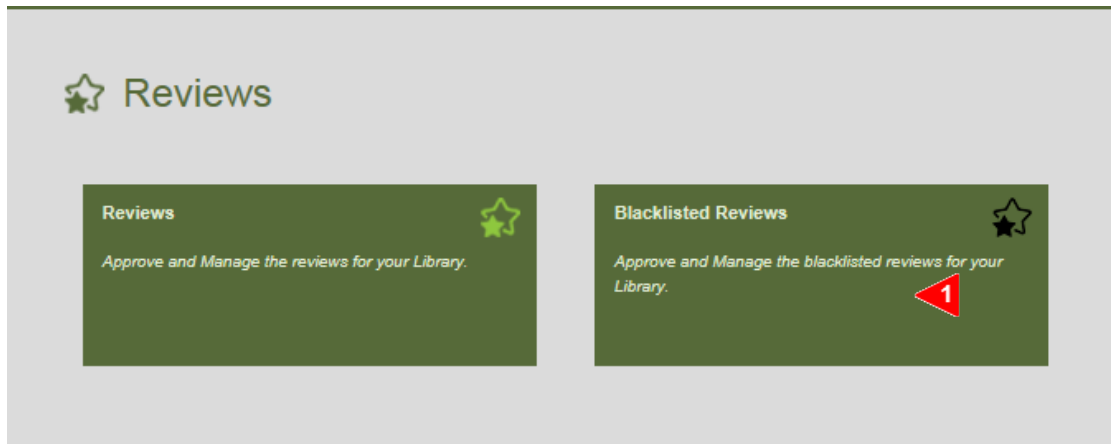
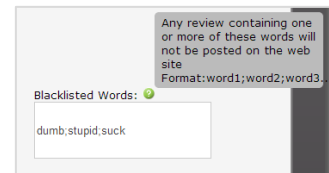
Wish List

Buy

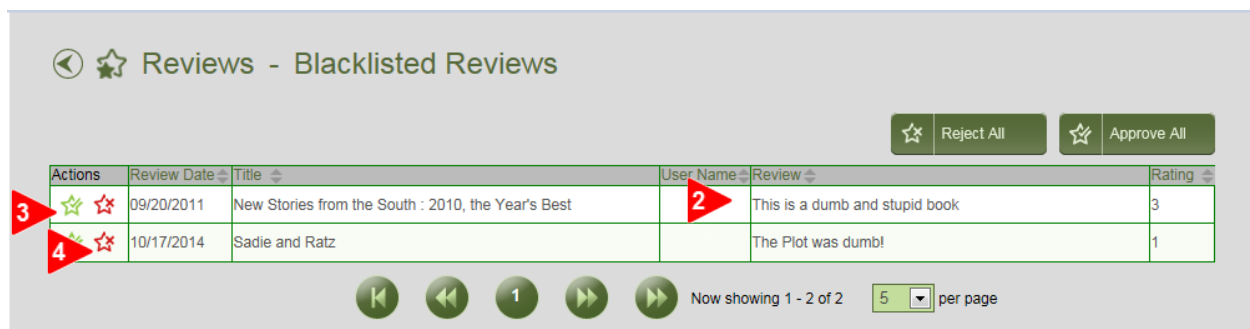
Approved reviews are posted to the site immediately and display on the Reviews tab for the title.

4.1.2 Blacklisted Reviews

Reviews submitted by users that contain any of the words entered in the Blacklisted Words field under Library Settings will display under Blacklisted Reviews. Blacklisted Reviews can be approved (and will display on the site immediately) or deleted.



1. After selecting Reviews, click **Blacklisted Reviews**.



This will display all pending reviews that contain words matching any of the Blacklisted Words.

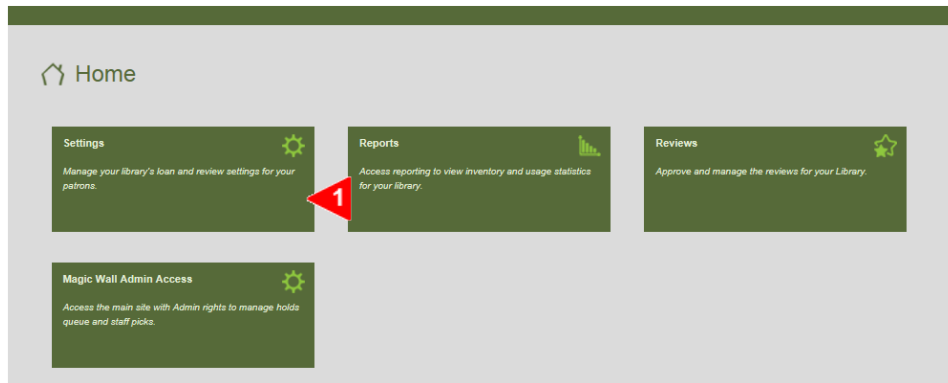
2. If the entire review does not display, a hyperlink appears. To read the complete review, click the hyperlink. In this example, the entire review fits in the space provided.
3. To approve a review, click the **Approve** icon.
4. To delete a review, click **Delete** icon.

5 Magic Wall Admin Access

5.1 Hold Queue Management

You may view which of your patrons are in the hold queue for a specific title.

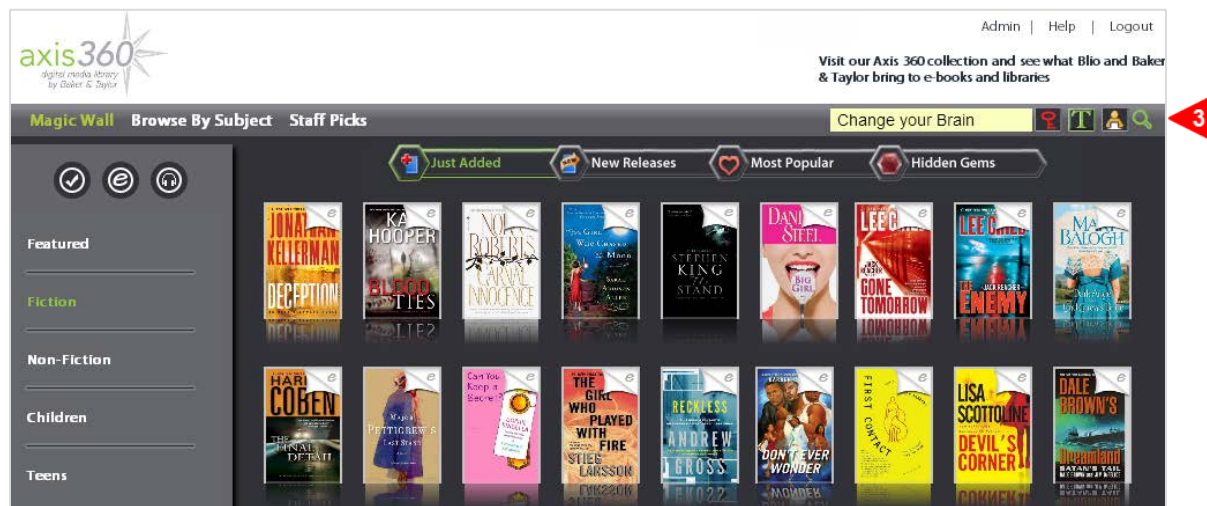
5.1.1 View Users in the Hold Queue



1. From the Home screen, click on “Magic Wall Admin Access”



2. The Magic Wall will open and you will notice that you are logged in as an Admin User.

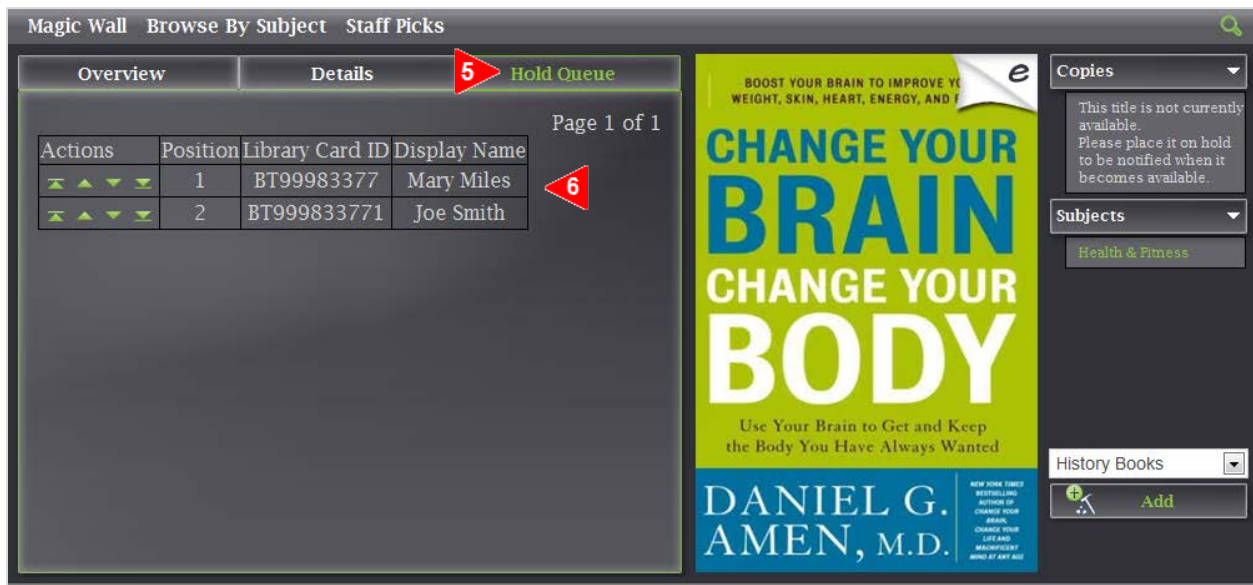


3. Click the **Search** icon and enter the title. Click the **Title** icon and click **Search**,

or press Enter.



4. Click the on the Cover Image.



5. Click on the **Hold Queue** tab.

6. From here you can view which of your patrons has a particular title on hold. Moving patrons in the hold queue will not work due to consortial settings.